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| **DEPARTMENT OF HEALTH SERVICES**  Division of Public Health  F-00052 (03/2022) |  | | **STATE OF WISCONSIN** | | |
| **application TO CONTRACT AS AN aging and disability resource center (ADRC)** | | | | | |
| Completion of this form is voluntary; however, the information requested in this form is required as part of the ADRC application process. | | | | | |
| **PART I – APPLICANT INFORMATION** | | | | | |
| Name – Aging and Disability Resource Center (ADRC) | | | | Date of Application | |
| Name – Applicant | | | | | |
| Name – Contact Person | | | | Phone Number | |
| Address (Street, City, State, Zip) | | | | | |
| Email Address | | | | | |
| **ADRC Service Area** (Counties to be Included) | | | | Date of Anticipated ADRC Start | |
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| **SUBMITTED BY** | | | | | |
| Name – Authorized Representative | | Title | | | |
| Name – Organization | | | | Phone Number | |
| Email Address | | | | | |
| **SIGNATURE** – Authorized Representative | | | | Date Signed | |
| Attach the following to the completed application form: | | | | | |
| A. County Board/Tribal Government Resolution(s) Authorizing the ADRC Application | | | | | |
| B. Letters of support | | | | | |
| C. Organizational Charts for the Proposed ADRC | | | | | |
| D. Other attachments (optional) | | | | | |
| **PART II – EXECUTIVE SUMMARY** | | | | | |
| In two pages or less, provide a summary description of the proposed ADRC, including the service area, client populations, organizational structure, office location(s), and approach to providing ADRC services. Highlight any distinctive characteristics of, or significant challenges faced by, the proposed ADRC. | | | | | |

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| **PART III – PROJECT PROPOSAL** (Please note: the completed proposal should not exceed 45 pages, excluding worksheets and attachments. It may have fewer if all requirements are met.) |
| 1. **Administrative Framework Proposed** (recommend 8-12 pages) |
| **1. Service Area**—Identify the county(s) or tribes to be served by the proposed ADRC. |

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| **2. Governing Board**—Describe the proposed structure and membership of the ADRC governing board. Identify other responsibilities the board will have, if any, in addition to those related to the ADRC. |

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| **3. Organizational Structure**—Describe how the ADRC will be organized, including areas of responsibility and reporting relationships. Please describe how the ADRC will be integrated or collaborate with aging services. What is the reporting relationship between the ADRC director and the governing body of the ADRC to other agencies of county government? If a regional ADRC is proposed, describe how authority and responsibility will be assigned. Attach a copy of the organization chart. |

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| Describe any administrative support that will be provided to the ADRC by the county(s), tribe(s) or other entities for information systems management, financial reporting, human resources, and other administrative needs. Identify what, if any, of this administrative support will be charged to the ADRC. |

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| **4. Director**—Identify the qualifications of the person to be hired to serve as the director of the ADRC. Describe the job duties of the director and the director’s authority and responsibility relative to the development of the internal operating budget, staff selection and supervision, and responsibility for the various functions of the ADRC. Please indicate if the director will have additional programmatic responsibilities. If so, indicate the percentage of the director’s FTE that will be dedicated to the ADRC. Attach a copy of the director’s position description, if available. |

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| 1. **Staffing**—Describe how the ADRC will be staffed to provide the required ADRC services, including the number of full and part time positions and the functions of these positions. Identify any positions which will be shared with other entities and perform duties in addition to their ADRC responsibilities. |

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| **6. Location and Physical Plant**—Identify the location of the ADRC, including any branch offices, if known, and describe its characteristics, including hours of operation, physical space (staff offices, conference rooms, reception area, etc.), parking, accessibility, external appearance, signage, etc., that will be present when the ADRC is open to the public and operational. Describe how the ADRC will make itself welcoming to the public. What, if any, current county or tribal agency(s) or staff will be incorporated or co-located with the ADRC? |

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| 1. **Equipment and Systems**—Describe how the requirements for a client tracking system will be met. Specify if the ADRC is planning to use WellSky software for this purpose.   Please indicate who will be designated as the client tracking lead. Please indicate who will be designated as the resource database lead. Describe plans for the ADRC’s website and telephone system. |

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| **8. Commitment to Health Equity**—Describe how the ADRC will be accessible and welcoming to people with physical or sensory disabilities, who speak little or no English, or whose culture may affect their ability to use the ADRC. Describe how the ADRC will identify and respond to inequities for accessing ADRC services. |

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| **9. Avoiding Conflicts of Interest**—Describe how the ADRC will ensure that all of its services are objective, unbiased, and in the best interest of the consumer. Describe how the ADRC will implement and train staff on the [Conflict of Interest](https://www.dhs.wisconsin.gov/publications/p02923-03.pdf) policy. |

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| **10. Grievances and Appeals**—Describe how the ADRC will implement and train staff on the statewide [Complaint and Grievances Regarding ADRC Services](https://www.dhs.wisconsin.gov/publications/p02923-02.pdf) policy and [Appeal Policy for Adverse Benefit Determinations](https://www.dhs.wisconsin.gov/publications/p02923-01.pdf). |

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| **11. Community Needs Identification**—Describe how the ADRC will secure consumer input and other information to identify the unmet needs of consumers in its service area. Explain how the ADRC will use this information to target ADRC outreach, education, prevention, and systems advocacy efforts and share the information with others outside the ADRC. |

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| **12. Collaboration with Local Agencies and Stakeholders** |
| Local Agencies—How will the ADRC partner with other county or tribal agencies and community organizations serving the target populations? |

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| Stakeholders—Describe how consumers, advocates, service network representatives, and other stakeholders will give input in the ongoing operations of the ADRC. |

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| **13. Quality Assurance/Quality Improvement Process**—Please describe how the ADRC will implement continuous quality improvement activities. |

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| **B. Provision of ADRC Services** (recommend 15-20 pages) |
| **1. Marketing, Outreach, and Public Education**—Describe the marketing, outreach, and public education strategies the ADRC will employ to make ADRC services known to members of its target populations, including people who are isolated or otherwise hard to reach, and to community agencies and service providers in its service area. Identify how the ADRC will work with hospitals, nursing homes, assisted living providers, and home health care agencies to encourage appropriate and timely referrals. Describe how the ADRC will measure the success of its marketing efforts. |

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| **2. Information and Assistance**—Describe how the ADRC will provide information and assistance (I&A) services. Include how the ADRC will meet the needs of members in each target group and coordinate with, rather than duplicate, I&A services already available in the county. Provide a list of any other organizations the ADRC will coordinate with in implementing I&A services. |

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| How will I&A activities be staffed? Will the initial calls be answered by a receptionist or by an I&A professional? Will I&A staff be generalists, or will they specialize in specific target populations or services? |

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| How will the ADRC assure that staff are qualified to provide I&A services and have expertise in serving all target groups? Please attach a copy of the I&A position description, if a draft has been developed |

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| 1. **Long-Term Care Options Counseling**—Describe how the ADRC will provide long-term care options counseling. Describe how long-term care options counseling will be coordinated with other ADRC services. |

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| 1. **Dementia Care Specialist services**— Describe how the ADRC will provide dementia care specialist services. Describe how the ADRC will ensure staff are knowledgeable about the Dementia Care Guiding Principles. Describe how staff will be trained to conduct memory screens as appropriate. |

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| 1. **Counseling to Caregivers**—Describe how ADRC staff will support caregivers by providing I&A and options counseling. |

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| 1. **Preadmission Consultation and Assistance with Resident Relocations**—Explain how the ADRC will provide preadmission consultation to people considering a move to a nursing home or assisted living facility. Explain how the ADRC will assist individuals who wish to relocate from a nursing home and how it will, if necessary, help those who need to relocate from a nursing or assisted living facility that is downsizing or closing. |

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| **7. Elder Benefits Counseling**—Describe how the Elder Benefit Specialist (EBS) program will be staffed and supervised, where EBS services will be provided, and how EBS services will be coordinated with I&A, DBS and other ADRC services. |

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| **8. Disability Benefits Counseling**—Describe the ADRC’s plan to implement Disability Benefit Specialist (DBS) services, including where the DBS will be located, how the DBS will be supervised, and how the DBS will coordinate with other ADRC services. How will the ADRC assure public awareness of and access to DBS services? |

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| **9. Access to Publicly Funded Long-term Care Programs (Family Care, Family Care-Partnership, PACE, and IRIS)**—How many ADRC staff will be trained and certified to use the Long-Term Care Functional Screen (LTCFS)? How will LTCFS be integrated with LTC options counseling and other services of the ADRC? Please indicate who will be designated as the LTCFS liaison. |

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| Describe how the ADRC will facilitate the financial eligibility determination process, including how it will assist customers and how it will coordinate with the income maintenance unit. |

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| How will the ADRC work with MCOs, ICAs, FEAs, and income maintenance units to assure that the eligibility and enrollment process is predictable, streamlined, and barrier-free for customers using the enrollment and disenrollment guidance? |

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| **10. Enrollment and Disenrollment Counseling**—Describe how the ADRC will provide counseling to people who want to enroll in a MCO or IRIS and disenrollment counseling for those who disenroll. |

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| 1. **Access to Other Public and Private Programs and Benefits**—Identify the key programs and agencies to which the ADRC will be making referrals, including, at a minimum, Medicaid, Medicare, SSI, SSI-E, Social Security, SSDI, FoodShare, Veteran’s services mental health services, and other public and private programs and benefits. Describe how the ADRC will establish referral protocols, resolve issues of access, and follow up to ensure consumers get what they need in a timely manner. Please indicate if the ADRC will be designated to perform initial SSI-E eligibility determinations for both MCO and IRIS enrollees. |

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| **12. Short-Term Service Coordination**—Describe how the ADRC will implement and train staff on the [Short-Term Service Coordination Policy](https://www.dhs.wisconsin.gov/publications/p02923-04.pdf). (Note: this is an optional service) |

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| **13. Access to Emergency Services**—Describe how ADRC staff will be trained to recognize and appropriately deal with emergency situations, including mental health and substance use crises; identify emergency service providers in your community with which the ADRC will coordinate, Describe how calls will be handled during and after business hours to ensure that people are connected promptly with appropriate providers of emergency services. |

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| **14. Access to Elder/Adults-at-Risk and Adult Protective Services**—Describe how the ADRC will identify people who may need (elder) adults-at-risk and/or adult protective services. Identify the agency(s) responsible for adults-at-risk and adult protective services in the ADRC service area, and describe how the ADRC will connect people in need with these services. In your description, include information about how the ADRC will respond to domestic violence, crises involving consumers of current long-term support programs, and contacts from law enforcement and hospital emergency rooms. |

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| **15. Transitional Services for Students and Youth**—Describe how the ADRC will market and outreach to young people with disabilities and their families who are leaving the school system and need access to adult services. How will responsibility for this activity be assigned within the ADRC? How will school systems be informed about the ADRC and engaged in the process of providing transitional services? What other organizations will be involved? |

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| **16. Health Promotion, Prevention and Early Intervention Services (optional)**—Indicate whether the ADRC will develop resources and expertise regarding preventable causes of long-term illness and disability and identify risk factors and appropriate prevention and early intervention strategies for individuals using the services of the ADRC. If so, how will prevention be integrated with the other activities of the ADRC? How will the ADRC coordinate with public health agencies and community service providers to secure resources, referrals, and cooperation for effective prevention programs? |

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| If applicable, describe how the ADRC will implement an evidence-based program to prevent or delay chronic disease and disability and reduce the need for hospital and long-term care facility admissions. |

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| **17. Customer Rights, Client Advocates, and ADRC Advocacy**—Describe how the ADRC will provide individual and systems advocacy, including provision of information about client rights, assistance in exercising those rights, and linkages with appropriate advocacy resources. Describe how the ADRC will avoid conflict of interest with MCO(s) and ICA(s) in advocating for individuals who receive services from these agencies. |

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| **19. Emergency Preparedness and Response**—Describe the role and the plan that the ADRC will have in emergency preparedness and response in the service area. Will the ADRC have the equipment necessary to operate remotely or at an alternate work location if the need arises? If the ADRC has a continuity of operations plan, please attach a copy. |

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| **C. Customer Service Process**—Describe or attach a flow chart that diagrams the process by which a customer will obtain services from the ADRC. Include the following, at a minimum: 1) how a customer will receive I&A, options counseling, and benefits counseling as their primary service; and 2) how a customer will access long-term care services via the ADRC. To the extent possible, indicate how many different people the customer will have to talk to and how often the customer will be required to repeat the same information. |

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| **D. Implementation Timeline** | | |
| **Key Tasks / Milestones in ADRC Implementation** | **Target Date** | |
| Appoint ADRC governing board |  | |
| ADRC start date |  | |
| ADRC director start date |  | |
| ADRC telephone system in place |  | |
| ADRC website in place |  | |
| I&A resources in place |  | |
| Client-tracking system in place |  | |
| Hire ADRC Specialist staff |  | |
| Train ADRC Specialist staff |  | |
| Provide EBS services at the ADRC (if applicable) |  | |
| Hire DBS |  | |
| Train DBS |  | |
| Begin offering DBS services |  | |
| Required ADRC Plans (for details, see [ADRC Organizational Structures](https://www.dhs.wisconsin.gov/publications/p03062-12.pdf) (P-03062-12)) | | |
| Develop an ADRC quality assurance and improvement plan |  | |
| Complete a [DCS Work Plan](https://www.dhs.wisconsin.gov/forms/f02882.docx) (F-02882) |  | |
| Develop ADRC health promotion, prevention, and early intervention plan |  | |
| If regional, complete a Regional Management Plan |  | |
| **E. ADRC Annual Budget—**Including Annual Budget, Personnel Worksheet, and Subcontract Worksheet. Please complete[**Annual Budget, F-00052A**](https://www.dhs.wisconsin.gov/forms/f0/f00052a.xlsx) | | |

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| **Budget Narrative** |

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